EPA Portal Overview & OCS Training

Welcome and Course Overview

Office of Environmental Information

Purpose of the Course

❖ To provide an understanding of:

- The features and capabilities of the Oracle Collaboration Suite (OCS) in the EPA Portal

❖ At the end of the course, students shall be able to:

- Create a workspace in OCS
- Use the following features of a workspace
    - Upload and view a file to the library
    - Post an announcement
    - Hold a discussion on the team discussion board
    - Create, assign, and update a task
    - Add a meeting to the team calendar
- Use Instant Messaging
- Use Web Conferencing

Syllabus

❖ An overview of collaboration needs

❖ OCS overview

❖ Workspaces

- Review the Steps needed to create a workspace
    - Set Workspace Properties
    - Create the Workspace
    - Add Members
    - Use the Workspace
    - Maintain the Workspace

❖ DEMONSTRATION/LAB: Create a workspace and add users to it

Syllabus (cont)

❖   Review the different features of a workspace
-   Meetings
-   Tasks
-   Announcements
-   Discussions
-   Views

❖ DEMONSTRATION/LAB: Try each OCS feature

❖ DEMONSTRATION/LAB: Use OCS to solve user needs
-   Show how to collaborate on a document using Discussion Forums
-   Show how to have two people edit a document at the same time using Web Conferencing
-   Show how to schedule a Web Conference to give a presentation
-   Show how to set up and use Workflow

❖ Maintaining the workspace
-   Removing Users

Syllabus (cont)

- ❖ Instant messaging
  - • DEMONSTRATION/LAB
    - ▪ Download the instant messenger client
    - ▪ Log into the Oracle Instant messenger
    - ▪ Send an instant message
- ❖ Web conferencing
  - • DEMONSTRATION/LAB
    - ▪ Show how to schedule a Web conference
    - ▪ Show how to start a Web conference
    - ▪ Show how to give a presentations to people in different locations
    - ▪ Show how to co-author a document from different locations

Portal Overview

What is the Purpose of the EPA Portal?

❖ The EPA Portal was created to meet the following business needs:

- Improved organization and discovery of information resources - community paradigm
- Improved framework for internal/external communication and collaboration
- Enhanced access control to information resources
- Reduced time to market
- Data sharing and integration
- "One Stop Shop" concept

EPA Portal Features

❖ The EPA Portal provides an interface to EPA's information resources that:

  ✓ Facilitates real-time **collaboration** with internal and external peers to share ideas and knowledge.

  ✓ **Organizes** resources to easily find data sources and analytical tools.

  ✓ Allows Program Offices and Regions to **share** their solutions and knowledge with interested individuals.

  ✓ Allows you to **personalize** your Portal to your own needs, and preferences.

EPA Portal Features

✓ Enables communities of users with similar interests to **customize** pages, displaying the data and tools relevant to their business needs.

✓ Ensures **controlled**, **authorized access** to Portal content, systems and tools and provides for centralized management of user identities.

✓ Allows for **growth** and maturation as new requirements and opportunities to employ new tools are identified.

✓ Provides a **single web address** and standard interface for Agency business partners to trade information and conduct business with EPA.

Oracle Collaboration Suite (OCS) Overview

OCS Overview

❖ Oracle Collaboration Suite (OCS) provides:

- A secure virtual collaboration space to share and collaborate on project information
- The ability to share knowledge and ideas with EPA employees and external users (e.g. State and Local users, contractors without EPA LAN accounts, etc.)

❖ Tools available in OCS:

- ▪ Workspaces
- ▪ Content Services
- ▪ Web Conferencing

Workspaces

❖ A Workspace is a team-based tool designed to track and manage content and project communications

❖ Workspaces provide a single place to utilize, organize, and view the following tools:

- **Meetings** provides a single place to record team activities
  - Does not interact with the Lotus Notes calendar

- **Tasks** allows a team to keep the tasks a team needs to complete in one central location

- **Announcements** allows team members to broadcast information that the entire team needs to know
  - Eliminates the need to send notification messages and records the announcement and the time it was created

- **Views** enables team members to make a custom collection of workspace items that they can easily use the items without going into each specific section of the Workspace

Content Services

❖ The Content Services feature provides users with a document repository to access files and documents within the collaboration environment

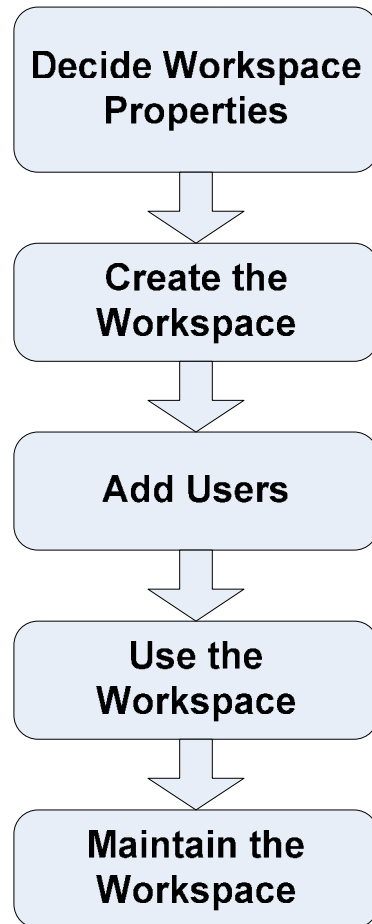- Share and modify files while simultaneously working with team members

Web Conferencing

❖ Web conferencing is used to conduct live meetings or presentations over the Internet

❖ Hold group meetings and presentations with attendees in different geographical locations

❖ The Portal provides a venue for EPA users to utilize Web Conferencing to:

- Broadcast presentation to EPA Staff in different geographical locations
- Co-Author a document in real-time
- Submit questions to the presenter

Workspaces

Steps To Create a Workspace

Decide Workspace Properties

↓

Create the Workspace

↓

Add Users

↓

Use the Workspace

↓

Maintain the Workspace

❖ **Decide Workspace Properties** that effect how the workspace behaves

❖ **Create the Workspace** for users to access

❖ **Add Users** to the workspace

❖ **Use the Workspace** to collaborate on team work

❖ **Maintain Workspace** by removing users who are no longer members of the team

Workspace Properties

Decide Workspace Properties

↓

Create the Workspace

↓

Add Users

↓

Use the Workspace

↓

Maintain the Workspace
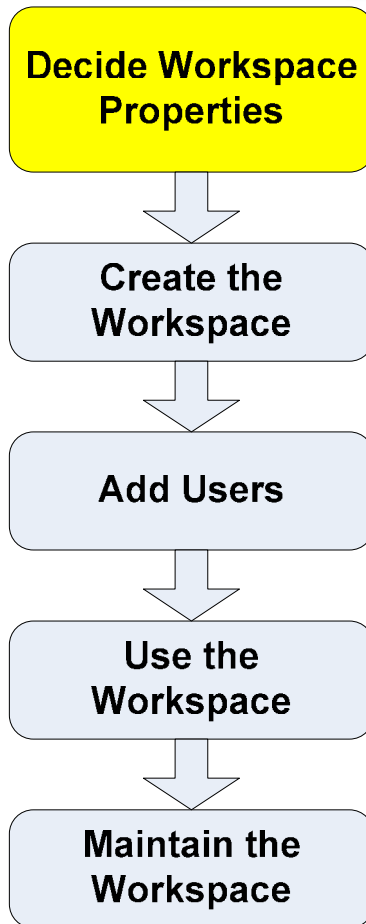
❖ **The Workspace has a number of properties that effect how the workspace haves. There are:**

- *Workspace Name* is the unique name of the workspace

- *Display Name* is the name displayed to the end users

- *Description* is a text description of the workspace

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Workspace Properties

Decide Workspace Properties

Create the Workspace

Add Users

Use the Workspace

Maintain the Workspace
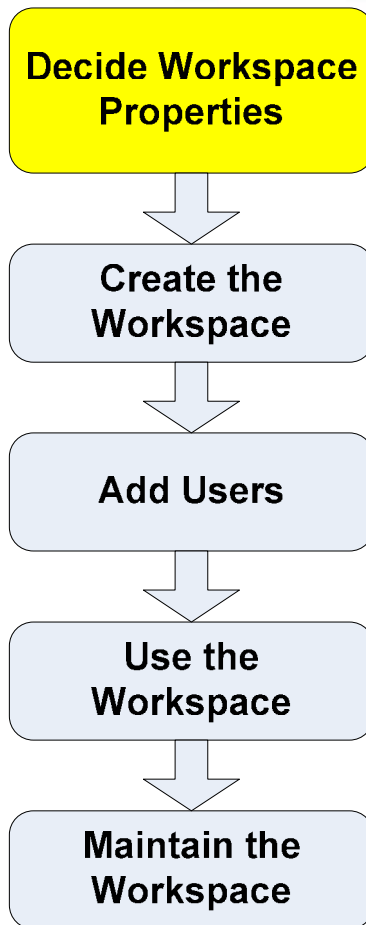
- *Default Member Role*
  - **Read – Users can only read the content of the Workspace. (Default)**
  - **Writer – Users can read and write to the Workspace. Specifically, they can add new folders to the *Library*, upload files, schedule meetings, create tasks, and participate in discussions.**
  - **Administrator – Users can do everything that writers can do. In addition, they may also manage Workspace configuration**
- *Membership Access*
- *Membership Notification*
  - **All Workspace members (default)**
  - **Only affected members**
  - **Disable notifications**

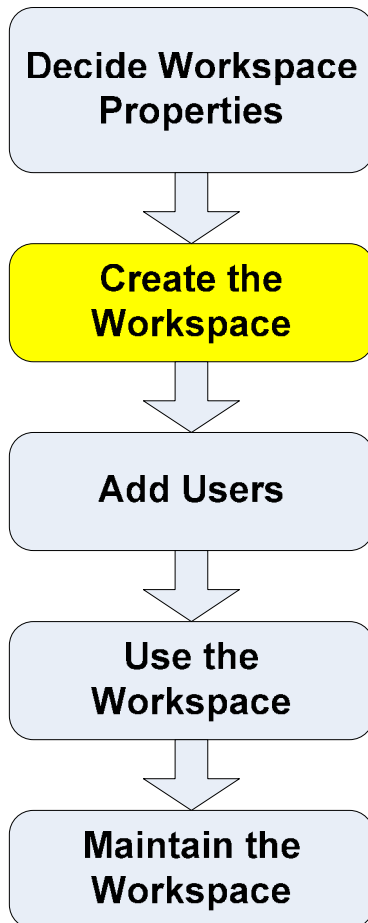ENTERPRISE TOOLS WORKSHOP

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Workspace Properties
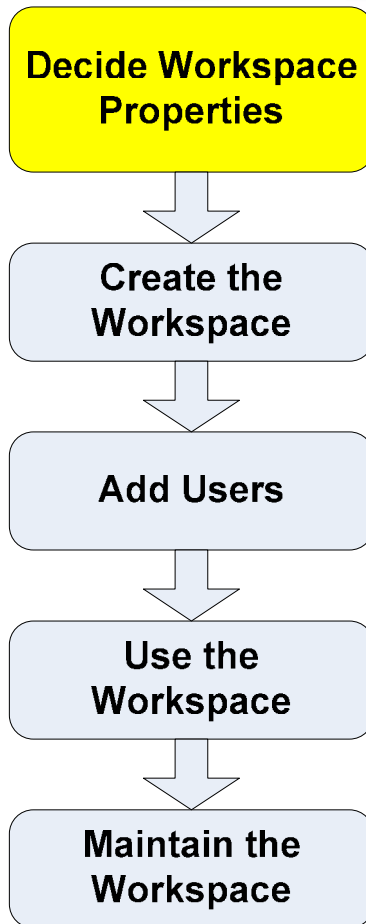
- *Workspace Listing*
  - **Publicly Listed (default) means that any Portal user can search the name, display name and description of the Workspace even if they are not members of the workspace**
  - **Only Viewable to members means that only members can find this workspace**
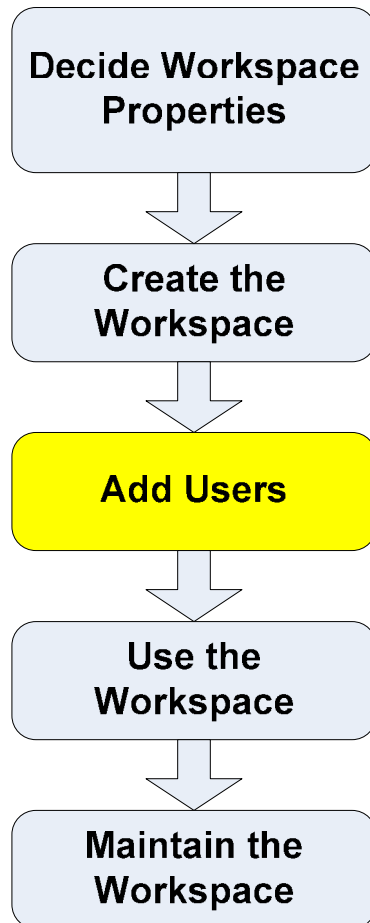- *Add to Favorite Workspaces* adds the workspace to the creators favorite workspaces

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20

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Create Workspace

Decide Workspace Properties

↓

Create the Workspace

↓

Add Users

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Use the Workspace

↓

Maintain the Workspace

❖ **Create the Workspace** for the users to access:

1. **Open a browser and navigate to http://portal.epa.gov**
2. **Login with your LAN userID and password**
3. **Under the *General Pages* community heading, click the *Team Resources* link**
4. **In the *Collaborative Workspace* portlet, click the *Enter Collaborative Workspace* link**
5. **Click on the *New Workspace* button to create a new workspace**
6. **Select *Basic Workspace Template* (default) radio button**
7. **Fill out the *Workspace Properties* form**
8. Click the *Ok* button

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21

Add Users

Decide Workspace Properties

⬇

Create the Workspace

⬇

Add Users

⬇

Use the Workspace

⬇

Maintain the Workspace

❖ **Add Users** to the workspace :
- Navigate to the workspace home page
- Select the M*embers* link from the left navigation bar
- Explain that the *Remove Me* button is what you would select if you want to remove yourself from a group.
- Select the *Add Members* button
- In the User ID text box, type any part of a Portal User name, and click the search icon next to the text box
  - Note: If you do not type a name, the search results will return every Portal user
- In the new window, select the radio button of the Portal user you wish to add to the workspace
- Click the *Select* button
- Select the role you wish the new member to have
  - Writer (default)
  - Reader
  - Administrator
- Click the Select Button
  - Note: The Portal user has **not** yet been added to the workspace
- Click the *OK* button

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Demonstration

❖ Create Workspace

❖ Add Users

User Workspace: Library

Decide Workspace Properties

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Create the Workspace

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Add Users

↓

Use the Workspace

↓

Maintain the Workspace
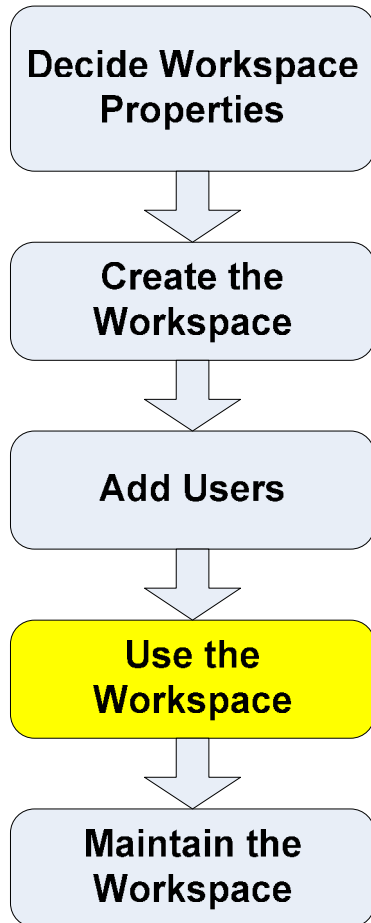
❖ The Library allows a team to post documents to share between the team members

❖ Features
- Creating Folders within Workspaces
- Posting Documents to Workspace Libraries
- Notifying users of Workspace postings/new content
- Managing access to Workspaces and folders
- Viewing Workspace Member profile information
- Searching Workspace content
- Using Versioning and Workflow

❖ Attention:
- The default workspace storage size is 50MB. More can be requested
- Creating file versions can use the quota faster than anticipated (e.g. 10 versions of a 1MB file uses 10MB)

Use Workspace: Meetings

Decide Workspace Properties

Create the Workspace

Add Users

Use the Workspace

Maintain the Workspace
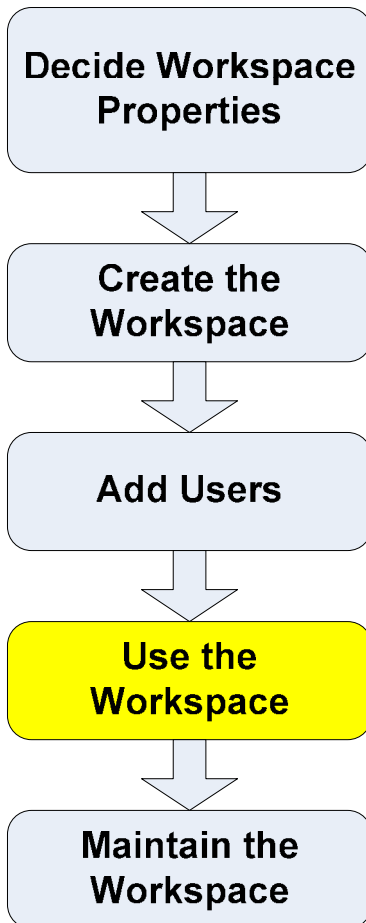
❖ The Meetings section of a workspace allows team meetings to be posted in a central location
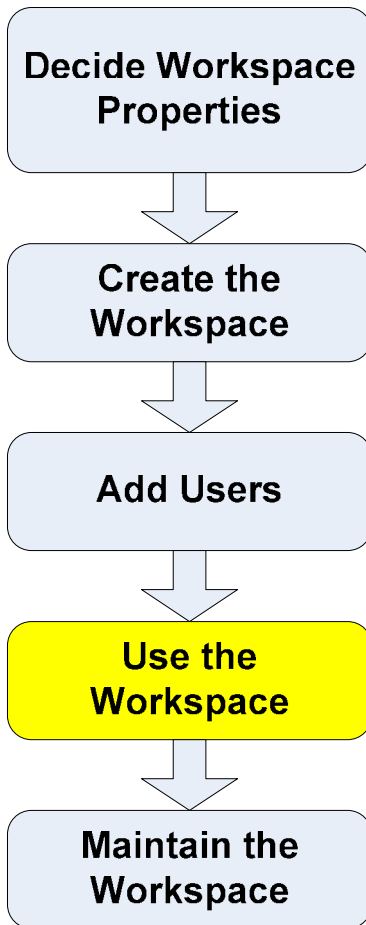
❖ Features:

- Add a meeting
- Delete a meeting
- View meetings

❖ Attention:

- The workspace calendaring function does not integrate with Lotus notes

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Use Workspace: Tasks

Decide Workspace Properties

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Create the Workspace

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Add Users

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Use the Workspace

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Maintain the Workspace

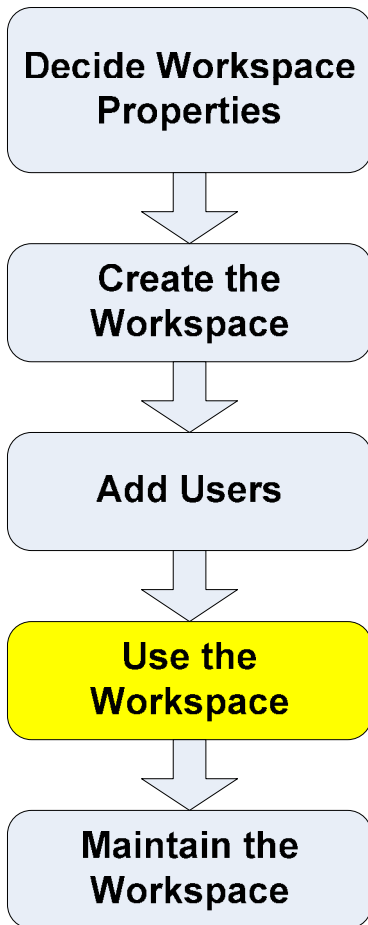❖ The Tasks section allows tasks to be assigned and tracked in a central location

❖ Features:

- Add a task
- Update progress
- View tasks

❖ Attention:
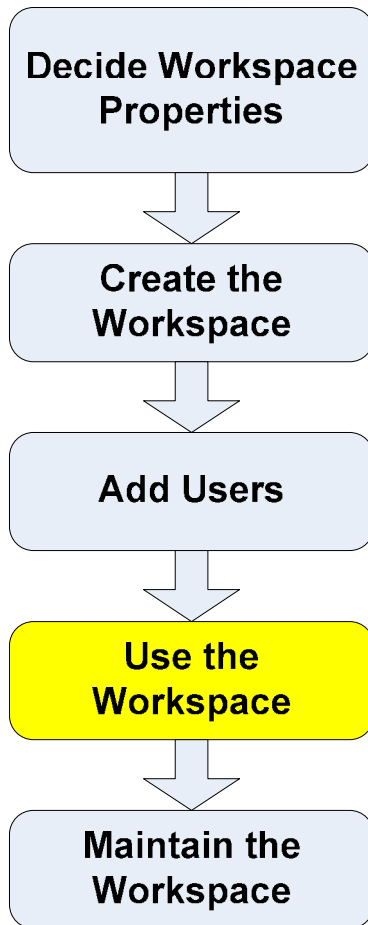
- Does not sync with Lotus notes

Use Workspace: Announcements

Decide Workspace Properties

Create the Workspace

Add Users

Use the Workspace
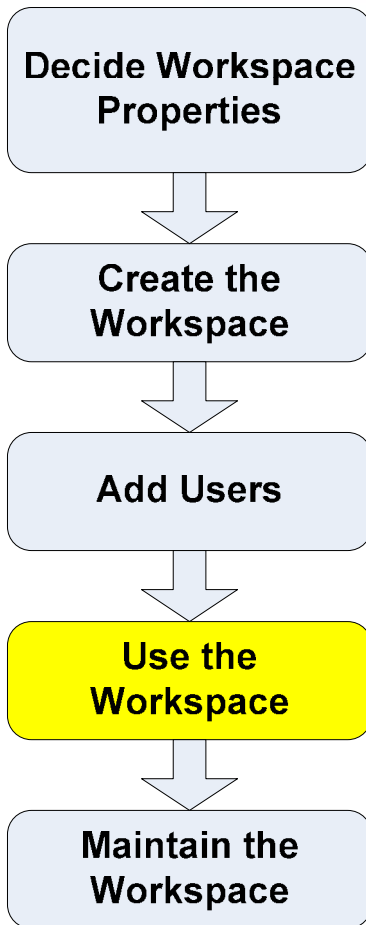
Maintain the Workspace

❖ The Announcement section allows announcements to be broadcasted to the team members

❖ Features
  - Add an Announcement
  - Send and email of the announcement to the team

❖ Attention:
  - The emails from the workspace will be <workspace_name>@epa.gov. This email address does not exist. If team members respond to an email announcement, the email will bounce

Use Workspace: Discussions

```
┌─────────────────────┐
│  Decide Workspace   │
│     Properties      │
└─────────────────────┘
          │
          ▼
┌─────────────────────┐
│     Create the      │
│     Workspace       │
└─────────────────────┘
          │
          ▼
┌─────────────────────┐
│      Add Users      │
└─────────────────────┘
          │
          ▼
┌─────────────────────┐
│      Use the        │
│     Workspace       │
└─────────────────────┘
          │
          ▼
┌─────────────────────┐
│    Maintain the     │
│     Workspace       │
└─────────────────────┘
```

❖ The Discussion section allows the team members to hold threaded discussions in a central location

❖ Features

- Creating Discussion Forums and Topics

- Responding to Discussions

Use Workspace: Views

Decide Workspace Properties

Create the Workspace

Add Users

Use the Workspace

Maintain the Workspace

❖ Views allows a team member to identify items in the workspace of interest and quickly navigate to them

❖ Features

- Create a New View

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29

Feature Demonstration

❖ **Library**
  - Create a folder
  - Upload a file
  - Set up versioning
  - Set up simple workflow
  - Notify Others

❖ **Tasks**
  - Create a task and assign to a team member
  - Update the task status

❖ **Views**
  - Create a view

❖ **Discussions**
  - Create a discussion forum
  - Post a topic
  - Respond to a topic

❖ **Announcements**
  - Post an announcement
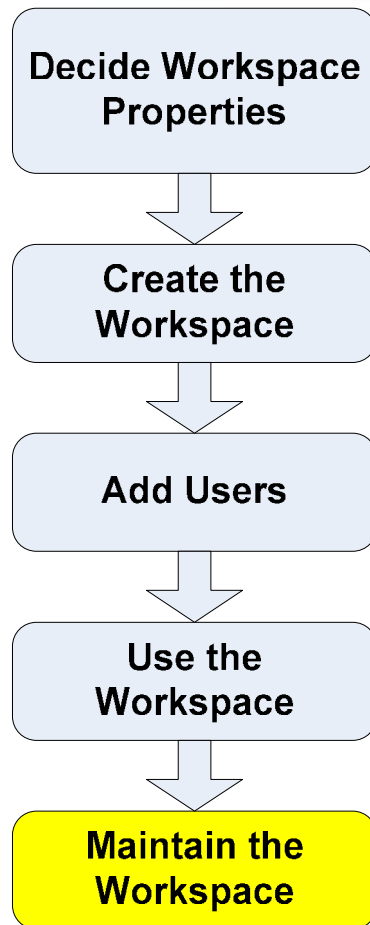 - View an announcement
  - Notify Others

❖ **Meetings**
  - Post a meeting

Solving User Needs with OCS

❖ How to collaborate on a document using Discussion Forums

❖ How to have two people edit a document at the same time using Web Conferencing

❖ How to schedule a Web Conference to give a presentation

❖ How to set up Workflow

Maintain Workspace

Decide Workspace Properties

↓

Create the Workspace

↓

Add Users

↓

Use the Workspace

↓

Maintain the Workspace

❖ Remove access to the workspace from old team members

❖ Remove the workspace if you're done using it

Instant Messaging

Overview

❖ Instant messaging allows Portal users to send text messages to each other

❖ Oracle Instant Messenger (IM) is completely contained inside of the EPA infrastructure. The messages sent through Oracle IM only goes through EPA servers

Instant Messaging Demonstration

❖ Download the instant messenger client

❖ Log into the Oracle Instant messenger

❖ Send an instant message

Web Conferencing

Overview

❖ Web Conferencing improves collaboration by promoting communication and interaction regardless of location

❖ Web Conferencing provides five (5) capabilities:

- **Document Sharing** allows users to select documents for participants to review before the meeting and show via desktop sharing during the meeting.

- **The Virtual Whiteboard** is a function of the Collaboration Tool that provides users with an interactive whiteboard whereby users can write, erase, or draw to communicate with other users.

- **Instant Messaging** is available through the Web Conferencing function to communicate with participants in real-time. This capability is ideal for quick, communication.

- **File Saving** allows users to keep files that are shared via Web Conferencing that are not accessible through the document repository.

- **Participant Polling** provides an opportunity for participants to track preferences, opinions, needs, etc…of their team.

Web Conferencing Demonstration

❖ Start a Web Conference

❖ Schedule a Web Conference

End

❖ Questions?

❖ For more information:

- View Portal online Help

- Call the Help Desk

- Contact Terry Grady at Grady.Terry@epa.gov

- Help Desk Phone Number: 866-411-4EPA (4372)